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From merger to managerialism

Summary

This case study is about the effects of a merger on a small youth work organisation. It includes some lessons learned about mergers: only merge if there is a cultural fit between the organisations, get the detail in writing, know where you will draw the line on the inevitable compromises you will have to make, and look after your existing colleagues and ways of working. It also includes some lessons learned about management practices: stick to your principles wherever possible, prioritise battles that mean the most to your service users and colleagues, find allies in the organisation you are working with, draw on the hard-won respect you've gained from working effectively with your service users and other organisations, focus on the work you want to do and don't get embittered by management conflicts and see if you can communicate your principles and apply the practices of community-based work rather than getting sucked into a more hierarchical management style.

Case study

I was working for AYP, a small youth work organisation, when our main funder withdrew its support because of its own financial constraints. Around the same time our manager left for personal reasons. She didn't want to leave us in the lurch so arranged for us to merge with another small local youth organisation (BYP). We were consulted but felt we had little choice: we briefly considered carrying AYP on without her but none of us were experienced in looking for funding, and that was a big worry because we would soon run out of money for salaries. We also had some challenging working relationships in our own team that would have made things even more difficult. So we took what felt was the easy route and merged, although to all intents and purposes it was a takeover: AYP no longer existed, and BYP kept its name and identity.

It immediately became clear that BYP was a far more managerial organisation than we had been used to. We noticed there had been positive things about our old ways of working, things we had perhaps taken for granted. For example, we youth workers had felt listened to by our manager at AYP. Because we were the ones on the ground, this listening was vital because it made it more possible to meet young people's needs. At AYP we tried to make decisions as a team – it wasn't always easy and we had disputes, but we managed to compromise. By contrast, BYP had a hierarchical decision making process. Our staffing structure was changed within two days of merging, our most senior worker was effectively demoted and the rest of us were given line management from original BYP staff. This is not what had been agreed before the merger but we were not consulted on the change and were told it was non-negotiable. We challenged this authoritarian kind of decision making by speaking out and asking questions, which was mostly met with surprise and defensiveness – it seemed that the BYP manager was unused to being challenged.

It felt as if we were no longer trusted as professionals. Neither organisation's managers had been experienced youth workers, but in AYP this meant our views were valued whereas in BYP we felt watched and controlled. Our local government funding required heavy monitoring and included unannounced inspections, sometimes by people not experienced in youth work. BYP added to this burden by requiring us to fill in spreadsheets with details of the monitoring we had done and how near we were to meeting our targets each month. As our targets were quarterly and the spreadsheet was monthly this created extra work. We now seemed to have to worry about our targets all the time. We told them it would have been more human and more useful if they had just spoken to us every month.

In a similar vein, BYP managers instituted a series of unannounced in-house inspections once per quarter; this meant our small once-a-week groups that had local authority funding were now inspected at least twice per quarter despite a lack of problems (we were graded 'good'). My ex-AYP colleagues and I tried to negotiate: we told my manager she was welcome to visit our groups any time, that in fact we would like her to get to know the young people and advise us of ways to improve our work, but we would rather she didn't bring her clipboard and monitoring paperwork as this would be stressful for ourselves and

for the young people. This was refused.

BYP also have policy overload, with new policies introduced almost weekly at one point. It is impossible to keep up to date with all of them. The organisation was also keen to achieve various kite marks, which all required even more paperwork, inspection and policies. When planning a trip we had previously spoken to our AYP manager and adapted a standard risk assessment. Now we had to complete a two-page tick-sheet which included several pieces of paperwork. If anything could be put on paper and made into a lengthy procedure, it was. It felt as if BYP was acting like a large and bureaucratic organisation, when in reality it is small enough that all its employees can fit around one table. As well as being a nuisance in themselves, these measures created a culture of 'us and them' between managers and youth workers. This division was particularly strong between ex-AYP workers and the BYP managers because we had experienced different ways of doing things. We were not only ideologically opposed to this managerial ways of doing things, we also felt emotionally undermined by the lack of trust in us as professionals, and the lack of faith in human interaction.

It was clear that we had different values and principles. AYP's membership form gave young people a choice of whether their information was shared with the local authority funder. This was the result of much discussion and controversy in our AYP team: we youth workers didn't agree with this information sharing but without it would have lost our funding. After the merger, BYP wanted us to use their membership form, which didn't give this choice. (Their deal with young people was: agree to share your information or you can't join our project.) We refused to use their form – we had already compromised in AYP and were not prepared to go further. BYP surprised us by letting us have our way. I'm not sure how or why we won this dispute: possibly they were fed up with fighting us (we were, and remain, fed up with fighting too). It probably helped that our funders were happy with our work, over half of our members agreed to share their information, and although the others simply weren't counted we still met our targets. We tried persuading BYP to change their own membership form, especially as they were exceeding their own targets, but they refused. They didn't seem willing to learn anything from us. We were always the ones expected to change, another reason it felt like a takeover not a merger.

We had been promised more secure funding to continue our original AYP groups if we

merged, but within four months I was told that two of my ongoing groups would close and I would be moved to a BYP youth club. I argued to keep the groups going. In the ensuing discussion I realised that BYP habitually sets up short-term projects for short-term funding streams, and thinks nothing of shutting them and starting something new. The young people in their groups have experienced nothing different but the AYP young people expect us to honour the relationships we have built with them and stay in touch until they are ready to move on.

After a lengthy lobbying process, involving talking up our groups to our managers, colleagues and trustees, and enlisting the support of other local organisations we had worked with for years, one of the threatened groups was reprieved on a reduced budget and the other was temporarily suspended (but we kept in touch through detached work). New funding was found for both groups a few months later, mostly due to support from local organisations and funders in the area, but it had been a challenging process. This was firstly because we now needed to find a greater proportion of funding to run the same projects (BYP had much larger overheads in terms of non-youth worker staffing and offices); and secondly because BYP saw other local organisations as competitors, including organisations we had previously done joint bids with. This whole process damaged our relationships with both groups of young people – the first, our newest group, were angry with us when we had to tell them their group might shut, and started damaging the community room and throwing equipment around, which they had never done before. The other group hardly saw us for months: this was a disappointment to them as we had just taken them on a residential where the relationships had grown stronger than ever, and as a result they had friends who wanted to join the group and ideas and enthusiasm for future projects.

From the things we have done badly and the things we have done well, we have learned some lessons about mergers and managerialism. Inevitably these are interrelated. On mergers:

- **Do you really want to merge?** Think twice and then think again! Find out about the culture of the organisation you are merging with, listen to your instincts and trusted local people and organisations. Consider other alternatives.

- **If you decide to go ahead, get things in writing.** if it is implied that you will keep your existing management structure and that your groups will be kept open for a certain length of time, make sure this is written down's didn't do this and regretted it.
- **Be prepared to compromise but not too far.** Know your limits and where you would draw the line, and stick to it We failed to do this at first, although we are learning to do so now.
- **Don't take things for granted.** I had assumed BYP was a relationship-based youth work organisation, and I was wrong. This explained a lot of our disagreements: now at least I know more accurately where discussions are starting from.
- **Be supportive within your old team.** We try to socialise together, check up on how each other are feeling, fill in for each other, and help each other out. This does keep us separate from BYP but this separation helps keep us sane. At the same time, we have also built relationships with individuals the new organisation and made attempts to recognise the good work they are doing.

On working in a managerialist organisation:

- **Insist on your principles but choose your battles.** We feel we are in constant conflict and it has been exhausting. We try to prioritise those battles which are most meaningful for the young people and for ourselves and our colleagues, and let other things drop.
- **Don't assume everyone thinks the same as the manager or strongest character.** Perhaps nobody ever speaks out because they have had years of hierarchical and controlling management. Perhaps the younger or less experienced workers have never known anything different. There are nearly always potential allies. Take your time and gradually learn who can be trusted and who will support you.
- **Earn yourself leeway and respect.** Some of our battles have been won because of the esteem in which we are held in our neighbourhood and the effectiveness of

our work. Keep working with your trusted local collaborators, and seek support but without giving too much away to anyone you can't fully trust.

- **Focus on the work you want to do.** I have had to consciously remind myself to focus on the youth work and not get too distracted and embittered by conflicts with managers.
- **Communicate your principles.** Educate your colleagues, your managers, their management committee. Show how your ideas work in practice. We have run training sessions on youth work for our colleagues and managers. Invite them in, tell them about your successes, and if they ignore you, tell them again and tell them that praise helps motivate you (yes, some people need to be told!). Once they are telling you 'well done' they may start to believe it.
- **Think about your options.** Can you continue working on a community-based level rather than getting sucked in to managerial ways of working? Is it possible to base yourself in a community building, or work in partnership with a more localised organisation, or work towards setting up an independent group?

This case study was researched and written by an independent researcher for NCIA.

The researcher wishes to remain anonymous to preserve the confidentiality of the research participants.

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